



Know about your benefits...
when life events occur.

CalPERS Member Education Catalog



As you go through life there are certain events that can impact your CalPERS benefits.



Whether you are new to CalPERS, in the middle of your career or nearing retirement, this booklet lists the training opportunities or educational resources to help you through these events as they apply to your life and your career. To help with this process, we have identified seven key life event categories:

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Each category includes several individual life events that are aligned with instructor-led or online classes, educational videos and publications and forms.

Where you can find information

Below you'll find educational resources about CalPERS programs and services relevant to the different stages of your career and life. Unless otherwise noted, follow these steps to find what you need to know for educating yourself on CalPERS and your benefits.

To guide you through specific life events, visit CalPERS On-Line at **www.calpers.ca.gov** and select **Life Events - What You Need to Know** under the Members tab.



Instructor-Led or Online Class

For a list of classes, visit the Member Education page under the Members tab.



Videos

To view our videos and upcoming Web events, visit the Video & Web Event Center under the About CalPERS tab.



Forms & Publications

For a directory of forms and publications, select the Find Forms & Publications button on the CalPERS On-Line home page.



My Career

As you navigate through the various phases of your career, you'll experience changes along the way. With these changes you'll have questions about your benefits, how to manage your career or what you need to know as you approach retirement. These educational resources will help answer your questions and guide you through your career events.

Welcome to CalPERS

If you are new to CalPERS, the following educational resources will be a helpful starting point to learn more about your benefits.



Instructor-Led or Online Class

New CalPERS Member



Videos

CalPERS Members: Early Career Basics
CalPERS Health Benefits for Public Agency and School Members
Health Benefits for State Members
Presenting the 2014 CalPERS Health Plans



Forms & Publications

Local Miscellaneous Member Benefit Publication (PUB 8)
Local Safety Member Benefit Publication (PUB 9)
School Member Benefit Publication (PUB 2)
State Miscellaneous & Industrial Member Benefit
Publication (PUB 6)
State Safety Member Benefit Publication (PUB 7)
Health Program Guide (HBD 120)
Power of Attorney (PUB 30)

Employment Changes

If you've experienced an employment change, such as taking a leave of absence, returning to work or leaving CalPERS membership, you can find what you need to know on the Life Events page on CalPERS On-Line. Additional educational resources that include this topic are listed below.



Instructor-Led or Online Classes

Continuing CalPERS Member



Videos

CalPERS Members: Early Career Basics
CalPERS Health Benefits for Public Agency and School Members
Health Benefits for State Members
Service Credit Purchases



Forms & Publications

A Guide to Your CalPERS Service Credit Purchase Options (PUB 12)
Refund/Rollover Election Package
When You Change Retirement Systems (PUB 16)
Health Program Guide (HBD 120)

See page 2 in this booklet to help you find the educational resources listed on these pages.

Illness/Injury/Disability

Because not all life events are reasons to celebrate, we want you to find the information you need to get through what may be a challenging time. Our Life Events page on CalPERS On-Line provides helpful information if you become terminally ill or disabled and are unable to work. Here are some other useful resources.



Forms & Publications

A Guide to Completing Your CalPERS Disability
Retirement Election (PUB 35)
Power of Attorney (PUB 30)
Health Program Guide (HBD 120)



My Life

Changes will occur in your personal life that will impact you and your family. These life changes can come in many forms – marriage, moving to a new home, birth or adoption of a child, divorce, or planning for your retirement. CalPERS has educational resources to help answer your questions and guide you through your life events.

Family Changes

With life comes change, which may mean adjustments to your member benefits information. Refer to our Life Events page on CalPERS On-Line for family changes such as getting married or registering a domestic partnership, getting divorced or ending a domestic partnership, birth or adoption of a child, and changing beneficiaries. Following are additional resources with information on this topic and much more.



Instructor-Led or Online Classes

Continuing CalPERS Member



Videos

CalPERS Members: Early Career Basics
CalPERS Health Benefits for Public Agency and School Members
Health Benefits for State Members
Health Benefits Into Retirement



Forms & Publications

A Guide to CalPERS Community Property (PUB 38A)
CalPERS Model Domestic Relations Orders (PUB 38B)
Changing Your Beneficiary or Monthly Benefit after Retirement (PUB 98)
Health Program Guide (HBD 120)
Nomination of Custodian for Minor Form

Personal Information Changes

It's important you have up-to-date contact information (name, mailing address, email and/or telephone number) on file with us. It's the only way we can ensure important CalPERS correspondence reaches you in a timely manner.

Along with the educational resources below, our online Life Events page provides information on changing your name and contact details.



Instructor-Led or Online Classes

- Continuing CalPERS Member
- Planning Your Retirement
- Completing Your Retirement Application
- Retired CalPERS Member



Videos

- CalPERS Members: Early Career Basics
- CalPERS Health Benefits for Public Agency and School Members
- Health Benefits for State Members
- Health Benefits Into Retirement
- Planning Your Retirement
- Your Retirement Options and Online Application



Forms & Publications

- Member Change of Address Form (PRS 221) (Retired member only)
- Tax Withholding Election (PDF, 117 KB) (Retired member only)
- Health Program Guide (HBD 120)

See page 2 in this booklet to help you find the educational resources listed on these pages.

Preparing for Retirement

If you're within a few years of retirement, planning is important. Select "Retiring" under Life Events on CalPERS On-Line to learn what you need to know about preparing for retirement. Other helpful resources are noted below.



Instructor-Led or Online Classes

- Planning Your Retirement
- Completing Your Retirement Application



Videos

- Benefit Basics
- Planning Your Retirement
- Your Retirement Options and Online Application
- Health Benefits Into Retirement



Forms & Publications

- Planning Your Service Retirement (PUB 1)
- Power of Attorney (PUB 30)
- A Guide to Completing Your Service Retirement Election (PUB 43)
- A Guide to Completing Your CalPERS Disability Retirement Election (PUB 35)
- A Guide to Completing Your Nonmember Service Retirement Election Application (PUB 44)
- Partial Service Retirement (PUB 14)
- Retirement Option 4 (PUB 18)
- Temporary Annuity (PUB 13)
- Health Program Guide (HBD 120)
- Employment After Retirement (PUB 33)
- Reinstatement from Retirement (PUB 37)

Death

Visit our online Life Events page for information regarding the death of a member, family member or to make a beneficiary change.

To notify CalPERS of a death, call our toll free number **888 CalPERS** (or **888-225-7377**), write to us or visit the CalPERS Regional Office nearest you.

Here are additional educational resources that contain this topic.



Instructor-Led or Online Classes

Continuing CalPERS Member
Planning Your Retirement
Retired CalPERS Member



Videos

CalPERS Members: Early Career Basics
Planning Your Retirement



Forms & Publications

Local Miscellaneous Member Benefit Publication (PUB 8)
Local Safety Member Benefit Publication (PUB 9)
School Member Benefit Publication (PUB 2)
State Miscellaneous & Industrial Member Benefit Publication (PUB 6)
State Safety Member Benefit Publication (PUB 7)
Health Program Guide (HBD 120)
Changing Your Beneficiary or Monthly Benefit after Retirement (PUB 98)
Retired Member Death Benefits (PUB 31)

See page 2 in this booklet to help you find the educational resources listed on these pages.

Member Education Bulletin

Subscribe to our new Member Education Bulletin to learn when our webinars, instructor-led classes and CalPERS Benefits Education Events will be held.

Visit CalPERS On-Line at **www.calpers.ca.gov** and select Email Subscriptions under the About CalPERS tab.

With Email Subscriptions, you can also subscribe to other CalPERS news alerts and newsletters.

We look forward to helping
you find what you want to know!



